



HUMAN SERVICES SPECIALIST I/II

FINANCIAL COACH

Do you excel at delivering top-notch customer service to your clients? Can you use your exceptional financial coaching skills to provide valuable guidance and assistance? Then the Human Services Department is the place for you!



We are an employer who values its people, creativity, quality service, integrity, open communication, mutual respect, and dignity

First Review of Applications:
June 29, 2015

ABOUT US

Fremont is a well-managed and innovative city, and has recently generated national attention by ranking second on the “Best Run City in America” list by 24/7 Wall Street and America’s third “Sharpest, Smartest City” by Reader’s Digest. Located in the heart of the Bay Area and Silicon Valley, Fremont prides itself on innovation, green technology, a low crime rate, great schools, a low unemployment rate, quality parks and nearby open space, and an incredibly diverse population of over 220,000 residents. As a full service city, Fremont employs nearly 900 regular employees and has an annual operating budget of approximately \$156.8 million.

Fremont is an employer that values its people, creativity, quality service, integrity, open communication, collaboration, mutual respect, and diversity. Employees find their work challenging, yet rewarding, and most importantly, enjoy the chance to make a difference through public service.

ABOUT THE HUMAN SERVICES DEPARTMENT

“Human Services works to support a vibrant community through services that empower individuals, strengthen families, encourage self-sufficiency, enhance neighborhoods and foster a high quality of life.”

THE POSITION

As an integral team member of the Family Resource Center (FRC), the Human Services Specialist will provide financial coaching services. The position will serve as the lead financial coach of SparkPoint Fremont, a collaborative program assisting individuals to build their financial assets. Additionally, the incumbent will teach financial literacy classes and assist with other asset building programs like Peer Lending Circles. Work during evening hours and weekends are required as necessary.

Depending on the successful candidate’s qualifications, the position may be filled as a Human Services Specialist Level I or Level II.

WHAT IS A TYPICAL DAY LIKE FOR THE HUMAN SERVICES SPECIALIST?

- Conducts comprehensive financial assessments with clients seeking SparkPoint services.
- Maintains data on client services for grant reporting including data entry into automated databases.
- Triage clients to self-help or to the appropriate SparkPoint program or other Family Resources Center services.
- Teaches Money Smart, an FDIC approved curriculum on financial management, Credit 101, and other financial literacy classes.
- Provides consultations and coaching (by appointment) on basic financial matters such as opening and maintaining bank and credit union accounts, pre-paid debit cards, saving, budgeting, retirement, and credit repair to families referred by Family Resource Center case managers or resource specialists.
- Works as a team member with SparkPoint-FRC partners and participates in regional trainings and meetings as needed.
- Conducts monthly SparkPoint information sessions.
- Performs human services support activities including referring clients/family members to appropriate community resources according to the client care plan.
- Follows up on client services, schedules meetings and appointments.
- Interviews and elicits personal information from clients, and program information from service providers; provides assistance to clients such as completion of forms, clarifies documentation discrepancies, and resolves issues related to clients’ needs and requests.

- Conveys general information regarding program services and interprets policies and regulations to clients, other agencies, and the community.
- Participates in community outreach activities and public presentations.
- Maintains confidential records, accurate client files, screens and processes forms, verifies authorizations on documents, and updates databases.
- Assists team members with interagency and/or family meetings, researching available resources, and preparing reports and statistical information.
- Establishes and maintains effective working relationships with clients, clinical team members, community agencies and other service providers.



QUALIFICATIONS:

Any combination of education and experience which has provided the knowledge and abilities necessary to satisfactory job performance would be qualifying. A typical way to obtain the required knowledge and abilities would be: completion of 60 semester units or 90 quarter units from an accredited college with coursework in financial planning or related field, **and** at least two years of professional experience providing financial coaching services.

The ability to speak Spanish in addition to English is highly desirable.

The ideal candidate will possess the following knowledge and abilities:

Knowledge of: Principles and techniques of interviewing required to obtain information to determine the nature of client situations; the functions and organization of public assistance and social service systems; principles and practices of financial management and coaching.

Ability to: Communicate effectively in oral and written form with individuals from diverse ethnic and socio-economic backgrounds; develop and maintain effective working relationships with clients, community agencies and service providers; make decisions and independent judgments; maintain accurate records and document actions taken; prioritize work and coordinate multiple work activities; adapt to procedural and technological changes, work independently in performing assignments and resolving problems within limits of responsibility and supervision.

Licenses/Certificates/Special Requirements

- This position requires possession of a valid Class C California Driver's License.
- Certification from the Association for Financial Counseling and Planning Education (AFCPE) is desirable. Any other financial literacy certification is also desirable.

COMPENSATION & BENEFITS

The annual salary is \$49,899 - \$66,705, depending on qualifications.

Fremont offers an attractive benefits package, which includes, but is not limited to: CalPERS retirement plan, paid holidays, medical, dental and other city paid benefits. A complete benefits summary can be found at Fremont.gov or by using this link: [Benefits Summary](#)

This position is represented by the FACE bargaining unit. The probationary period for this position is six (6) months.

Tentative Recruitment Schedule

First Review of Applications: June 29, 2015

Interviews: July 13, 2015



READY TO APPLY?

To be considered for this position, apply online by submitting a completed City application and resume through our online application system: www.fremont.gov/cityjobs.

The testing process for this position may include an individual and/or panel interview, written exam and other selection components. Only those candidates who have the best combination of qualifications in relation to the requirements and duties of the position will continue in the selection process. Meeting the minimum qualifications does not guarantee an invitation to participate in the process.

Reasonable Accommodation

Human Resources will make reasonable efforts in the examination process to accommodate persons with disabilities. Please advise Human Resources of any special needs a minimum of 5 days in advance of the selection process by calling (510) 494-4660. The City of Fremont is an Equal Opportunity Employer.

Human Resources Department

3300 Capitol Ave., Bldg. B
Fremont, CA 94538
(510) 494-4660



The information contained herein is subject to change and does not constitute either an expressed or implied contract.

SUPPLEMENTAL QUESTIONNAIRE - HUMAN SERVICES SPECIALIST I/II

GENERAL INFORMATION:

The completion of this supplemental questionnaire is required for your application to be considered for the Human Services Specialist I/II position, and is an integral part of the examination process.

This supplemental questionnaire will be used to assess your experience as it relates to the position of Human Services Specialist I/II. Your responses will be evaluated and will assist in determining which applicants will receive further consideration in the examination process.

Your responses must be verifiable with the information on your application.

DIRECTIONS:

When you apply online you will be asked to respond to the following questions:

1. How many years of professional work experience do you possess in performing financial coaching related duties (e.g. conducting comprehensive financial assessments; consultations with clients about basic financial matters like saving, budgeting, credit repair; referrals to financial services)?
 - ☐ None
 - ☐ Less than 1 year
 - ☐ 1 year to less than 2 years
 - ☐ 2 years to less than 3 years
 - ☐ 3 years to less than 4 years
 - ☐ 4 years to less than 5 years
2. What is your highest level of education?
 - ☐ Did not complete high school
 - ☐ High school diploma or equivalent
 - ☐ Some college
 - ☐ Associate's degree
 - ☐ Bachelor's degree or higher
3. If you answered Some college or higher, list your courses or degree that's relevant to this position.

4. Are you fluent in speaking both English and Spanish?
 - ☐ Yes
 - ☐ No
5. Do you possess a currently valid certification from the Association for Financial Counseling and Planning Education?
 - ☐ Yes
 - ☐ No
6. Do you possess a currently valid certification for coaching/teaching financial literacy?
 - ☐ Yes
 - ☐ No